

## **Amendments to the Claims**

### **Listing of Claims**

This listing of claims will replace all prior versions and listings of claims in the application:

Please amend claims 1, 5, 6, 21-24, 27, 28, 29, and add new claims 31 and 32.

1. (Currently amended) A method for interacting with a customer interaction center, comprising the steps of:

determining a channel through which a customer interaction between a customer and the customer interaction center will be conducted, including identifying

a telephone connection from the customer to an automated telephone system,

a telephone voice connection between the customer and a human customer service representative,

postal mail from the customer,

electronic mail from the customer, and

a facsimile connection between the customer and the customer interaction center,

a client computing device connection from the customer to the customer interaction center through a public network, and

a thin client connection device from the customer to the customer interaction center through a wireless interface;

if the channel is one of postal mail, electronic mail or facsimile connection, transmitting an acknowledgement to the customer with an expected time to reply;

if the channel is one of a telephone connection, a telephone voice connection, a client computing device and a thin client computing device,

establishing a connection between the customer and the customer interaction center along the channel;

automatically calculating a customer value for the customer based on historical customer interaction information contained in interaction databases including previous activities, purchases, or accounts of the customer recorded and stored on systems

belonging to and backed up by the customer interaction center as transaction records for previous transactions between the customer and the customer interaction center over all possible channels, including reconciling the transaction records from different channels to produce the customer value;  
determining whether said customer value exceeds a predetermined customer value threshold, the customer value threshold defining the channels through which the current interaction may proceed so that lower valued customers have access only to channels requiring less interaction with a customer service representative of the customer interaction center and channels providing a slower than real-time response to queries from the customer; and  
if said customer value is less than said predetermined customer value threshold, presenting said customer with a partial list of interaction options over the computer network and receiving a selected interaction option from the customer over the computer network, wherein said selected interaction option is listed on said partial list;  
if said customer value is not less than said predetermined customer value threshold, presenting said customer with a complete list of interaction options over the computer network and receiving a selected interaction option from the customer over the computer network.

2. (Previously presented) The method of claim 1, further comprising the step of conducting the interaction in accordance with the selected option.

3. (Cancelled)

4. (Previously presented) The method of claim 2, further comprising the steps of:  
retrieving a contact history that corresponds to said customer from a contact history database;  
presenting the contact history to a customer service representative (CSR); and

interacting with the customer in accordance with the contact history, wherein said contact history comprises information related to previous interactions with the customer.

5. (Currently amended) The method of claim 4, wherein the step of interacting with the customer, further comprises the following steps:

- observing at least one customer response to a specific question;
- creating a customer profile based on said at least one customer response;
- recording said at least one customer response to a specific question in a customer interaction database record contained in the customer interaction database;
- repeating the observing, creating and recording steps until the completion of the interaction; and
- copying said customer interaction database record to said contact history database.

6. (Currently amended) The method of claim 4, wherein the step of interacting with the customer further comprises of the following steps:

- receiving a request from a client computing device;
- determining whether said request originates from a first client computing device comprising a first processor or from a second client computing device comprising a second processor, wherein said first client computing device comprises a slower central processing unit and a lower resolution display than said second client computing device; and
- responding to said request by adjusting and customizing the level of graphics and data sent to the client device in to a format compatible with said first client computing device if said request originated from said first client computing device ;
- responding to said request by adjusting and customizing the level of graphics and data sent to the client device in to a format compatible with said second client computing device if said request originated from said second client computing device.

7. (Original) The method of claim 1, wherein the step of automatically calculating a customer value based on historical customer interaction information, further comprises the following steps:

processing a customer request to purchase an item or service;  
retrieving historical customer interaction data associated with said customer from a customer value database;  
computing a customer value based on said customer request and the historical customer interaction data; and  
updating said customer value database.

Claims 8-20 (Cancelled)

21. (Currently amended) A customer interaction system for an enterprise, the system comprising:

a plurality of customer service representative (CSR) computing devices suitable for voice and data interaction between a CSR and a customer of the enterprise;  
a customer interaction module in communication with each CSR computing device, the customer interaction module comprising:  
an interaction database system storing  
data about customer profiles and preferences including previous activities, purchases and accounts of each customer, customer contact history data, and data about a current interaction with a customer;  
a transaction/information processing system under control of a control program for communicating data between the CSR and the customer, the control program configured to control the customer interaction system, including automatically calculating a customer value for the customer based the previous activities, purchases and accounts of each customer and on the data about a profile and preferences of the customer, the customer contact history data and data about a current interaction with the customer retrieved from the interaction database system[,]  
stored on systems belonging to and backed up by the customer interaction center;

if the customer value is less than a predetermined threshold, presenting the customer with a partial list of options for interaction with the CSR, and receiving a selected option from the customer, and  
if the selected interaction option comprises a client computing device connection from the customer to the customer interaction center through a public network, displaying to the CSR information from the interaction database system about the profile and preferences of the customer, information from the interaction database system about previous interactions the customer has had with other CSRs, an image of a Web page currently being accessed by the customer, and suggested scripts for delivery by the CSR.

22. (Currently amended) The customer interaction system of claim 21 wherein the control program is further configured to control the customer interaction system for pre-configuring and customizing information for display to the customer on a client computing device of the customer based on the data about the customer's profiles and preferences, the customer's contact history data, and data about the current interaction with the customer from the interaction database system.

23. (Currently amended) The customer interaction system of claim 22 wherein the control program is further configured to control the customer interaction system for pre-configuring and customizing the information for display based on a received request for product or service information from the customer.

24. (Currently amended) The customer interaction system of claim 23 wherein the control program is further configured to control the customer interaction system for providing customized information about related products and services based on the data about the

customer's profiles and preferences, the customer's contact history data, and data about the current interaction with the customer from the interaction database system.

25. (Previously presented) The customer interaction system of claim 23 wherein the control program is further configured to control the customer interaction system for storing in the interaction database system information about the request received from the customer and information about the pre-configured information provided to the customer.

26. (Previously presented) The customer interaction system of claim 21 further comprising:  
an automated telephone system responsive to keypad data and voice information  
originating with a customer through telephone interaction with the  
customer interaction system; and  
a mail processing system to process written postal and electronic mail and  
facsimile interactions from a customer through written correspondence  
with the customer interaction system.

27. (Currently amended) A method for interaction between a customer and a customer interaction center, the method comprising the steps of:

recording transaction records on systems belonging to and backed up by the customer interaction center for transactions between a customer and an entity served by the customer interaction center over all interaction channels;

automatically calculating a customer value for the customer based on historical customer interaction information contained in interaction databases including the recorded transaction records, including reconciling the transaction records from different channels to produce the customer value;

comparing the customer value with a predetermined customer value threshold, the customer value threshold defining the channels through which the current interaction may proceed;

based on the comparison, determining a channel through which the customer interaction between the customer and the customer interaction center will be conducted;

during interaction with the customer, retrieving from a contact history database a contact history that corresponds to the customer, the contact history including information related to previous interactions between the customer and the customer interaction center;

presenting the contact history to the CSR; and

interacting with the customer in accordance with the contact history, including

observing at least one customer response to a specific question;

creating a customer profile based on the observed customer response;

recording the observed customer response to a specific question in a customer interaction database record;

repeating the observing, creating and recording in a customer interaction database record steps until the completion of the interaction; and

copying the customer interaction database record to the contact history database.

28. (Currently amended) The method for interaction between a customer and a customer interaction center of claim 27 wherein determining a channel through which the customer interaction will be conducted comprises selecting a channel among all possible channels so that

if the customer value does not exceed the predetermined customer value threshold, the

customer is presented with a partial list of interaction options over the computer network and a selected interaction option listed on the partial list may be received from the customer over the computer network; and

if the customer value exceeds the predetermined customer value threshold, the customer is presented with a complete list of interaction options over the computer network ~~and~~ and a selected interaction option may be received from the customer over the computer network.

29. (Currently amended) The method for interaction between a customer and a customer interaction center of claim 27, wherein the step of interacting with the customer further comprises:

receiving a request from a client computing device of the customer;

determining whether the request originates from a first client computing device comprising a first processor or from a second client computing device comprising a second processor, wherein the first client computing device comprises a slower central processing unit or a lower resolution display than the second client computing device; and

responding to the request by adjusting and customizing the level of graphics and data sent to the client device ~~in~~ to a format compatible with the first client computing device if the request originated from the first client computing device; and

responding to the request by adjusting and customizing the level of graphics and data sent to the client device ~~in~~ to a format compatible with the second client computing device if the request originated from the second client computing device.

30. (Previously presented) The method for interaction between a customer and a customer interaction center of claim 27, wherein the step of automatically calculating a customer value based on historical customer interaction information comprises the following steps:

processing a customer request to purchase an item or service;  
retrieving historical customer interaction data associated with the customer from a customer value database;  
computing a customer value based on the customer request and the historical customer interaction data; and  
updating the customer value database.

31. (New) The method of claim 1 wherein the interaction databases comprise: tabular numeric and character string data, and can also include free text data, scanned images, recorded voice from telephone interactions and other types and formats of data.

32. (New) The method of claim 31 wherein the interaction databases comprise several specific databases that store and manage data including but not limited to: a profile and preference database containing a set of selection criteria pertaining to customer preferences, a customer contact database containing the contact history for a particular customer including the customer's response and mood, and



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a customer interaction database records the content of a current interaction with the customer and the customer response/mood.